

**CommunityBanc, Inc.**  
**Notice of Open Position**

DATE: March 24, 2025

**THIS POSITION IS NOW OPEN:**

Job Title: Customer Service Representative III-Supervisor  
Company/Department: The Community Bank  
Location: Crooksville Banking Office  
Schedule: M-S rotation and as needed for business operations.

**Summary:**

Supervises all Customer Service Representatives at the banking office. Oversees operation of the banking office, ensuring that established policies and procedures are followed. Responsible for leading, coaching, mentoring, and inspiring a great CSR Team.

**Essential Duties and Responsibilities:** include the following. Other duties may be assigned.

- Functions as a Customer Service Representative
- Supervises Customer Services Representatives.
- Oversees operations of the banking office.
- Works directly with Banking Office Manager on office scheduling.
- Leads training for new hire CSR's by following guidelines and checklists communicated by the Training Department.
- Completes Monthly Audit Security Checklist.
- Oversees completion of Safe Deposit Box Audits.
- Conducts scheduled and random audits.
- Manages the opening and closing of the office.
- Assists customers and makes them feel welcome.
- Answers phone and assists customers with transfers and routes calls as necessary.
- May assist with vault duties as needed.
- Advises and approves Vault CSR's cash orders and works directly with the Vault CSR in monitoring daily cash totals of the office.
- Remains knowledgeable of Bank's products and services and explains to customers accurately.
- Explains, promotes, and sells products such as check cards, checking accounts, loans, CD's, and Digital Banking.
- Explains, promotes, and refers our Community Financial Advisors, Financial Services Officer, Mortgage and Commercial Lenders.
- Conducts account maintenance, account balance and research.
- Reviews and monitors accounts as needed.
- Manages and resolves customer complaints.

- Maintains and services remote ATM's as needed.
- Balances the ATM as needed.
- Participates in community involvement activities outside of the Bank when office schedule allows.
- Attends various internal operational meetings.
- Represents Bank in a positive manner in all relevant market areas.
- Coordinates communications, workflow and reporting activities between departments and banking office to ensure correct and efficient daily operations. Works closely and efficiently with all other departments in the Company.
- Keeps employees informed of current policies and new procedures to maintain good customer service and uniform operating methods.
- Analyzes present systems, methods, and personnel to formulate recommendations to streamline operations, automate and reduce costs. Seeks opportunities to improve office efficiencies to better serve customers.
- Ensures adherence to the internal controls associated with banking operations.
- Communicates regularly with Banking Office Manager on successes, issues, concerns, ideas, and recommendations. Confers with Banking Office Manager and other Management team members to review achievements and discuss required changes in goals or objectives resulting from current status and conditions.
- May assist in preparation of the annual budget and financial goals.
- Manages CSR line to ensure operational practices are in compliance with regulatory procedures and security standards.
- Maintains knowledge of security and safety policies and adheres to procedures; works closely with the Safety and Security Officer to ensure that employees are properly trained and made aware of any changes to procedures.
- Works closely with the Safety and Security Officer and with proper law enforcement officials pertaining to robberies, forged checks, identity theft issues and internal discrepancies.
- Ensures that employees are trained in applicable rules and regulations and are made aware of any compliance changes.
- Works with Banking Office Manager to lead the office team with disaster recovery, emergencies, procedures, and execution such when required.
- Provides employees with needs such as: approving checks, overrides, signing cashier checks.
- Is responsible for disclosures and postings in the lobby and employee area.
- Ensures office equipment, systems and technology is working properly; ensures that CSR's are aware of how to use appropriately. Follows proper channels to address any equipment, systems and technology issues.
- Works with Banking Office Manager in investigating and resolving complex office operational issues; handles complex customer issues and communicates with customers and/or the appropriate banking professionals.

- Resolves customer complaints and issues while maintaining a professional and calm demeanor.
- Coordinates with Banking Office Manager and Universal Banker to conduct monthly office team meetings which include communications, training, motivating employees and sharing information as appropriate from management meetings.
- Supervises and trains CSR's on referral and sales techniques.
- Oversees and reports CSR referrals and sales to reach established goals.
- Assigns and manages CSR duties and tasks in order to ensure proper productivity and functionality.
- Coaches and motivates CSR's and ensures a positive and safe working environment.
- Trains new and current CSR's and ensures CSR's complete and attend required training.
- Ensures all CSR annual goals and CSR referral goals are met.
- Manages and resolves CSR employee issues, involving Banking Office Manager, Banking Offices Administrator and Human Resources when necessary.
- Works with Banking Office Manager, Banking Offices Administrator and Human Resources to ensure all counseling reports, performance improvement plans, warning notices, final warning notices and notices of discharge are prepared objectively and accurately.
- Prepare, review, and monitor performance appraisals for CSR's.
- Tracks career path interests and opportunities for CSR's.
- Continually coaches CSR's on professional development and job performance expectations.
- Documents employee files properly.
- Approves CSR timecards and PTO requests in payroll system.
- Handles and tracks CSR time off requests.
- Handles and tracks CSR hours ensuring hours work or scheduled is in accordance with the policies set forth.
- Monitors and mitigates overtime for all CSR's.
- Follows, supports, and enforces Company policies and procedures.
- Positively represents the Company's culture and values.
- Achieves annual goals as assigned.
- Completes annual required regulatory training curriculums as assigned.

### **Supervisory Responsibilities**

Directly supervises Customer Service Representatives (CSR's) in the banking office. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

### **Education and/or Experience**

Associate's degree (A. A.) or equivalent from two-year college or technical school plus two to three years related experience and/or training; or equivalent combination of education and experience.